



Estate Gift Intent

Legacy Society members make their plans known to us in advance with as much detail as they like. Making your wishes clear to Santa Monica College Foundation in advance helps ensure your gift is applied as you intend and that you are recognized or remain anonymous according to your wishes. Being able to track anonymously the overall number of generous people who have made a provision for Santa Monica College Foundation in their estate plans helps us attract additional donors. This document is non-binding. Your information will be kept strictly confidential and we will recognize your legacy gift only with your approval.

☐ **Yes! I have included Santa Monica College Foundation in my estate plan.**

Name _____

Address _____

City, State, Zip _____

Phone _____ Email _____

Name of Trustee or Executor _____

Address _____

City, State, Zip _____

Phone _____ Email _____

IMPORTANT:

Please be sure to use our complete official name, Santa Monica College Foundation, in your estate planning documents or when designating a beneficiary for IRA, investment accounts or other assets. Santa Monica College Foundation is a separate entity from Santa Monica College. We are an IRS designated nonprofit 501(c)(3) ID number, 95-6047779.

Type of gift:

- ☐ Will/Living Trust
- ☐ IRA/Retirement Account*
- ☐ Bank, Brokerage or Other Financial Account*
- ☐ Privately held stock
- ☐ Life Insurance Policy
- ☐ Charitable Trust
- ☐ Other (please specify) _____

** Please note that some firms and financial institutions do not contact beneficiaries when the account holder is deceased. Therefore, if you designate Santa Monica College Foundation as a beneficiary of any account not covered by your will, please notify us so we are aware of the designation in order to claim the gift when the time comes.*

My future gift amount:

- ☐ Is a percentage of my estate. The estimated amount of my gift is \$ _____
- ☐ Is in the specific amount of \$ _____
- ☐ I wish to keep the amount of my gift confidential.

My future gift is designated to support:

- ☐ The priority needs at the time it is received.
- ☐ Endowment Fund invested to create earnings that support the foundation's mission and greatest needs going forward.
- ☐ A specific program or department _____.
- ☐ Scholarship aid generally.
- ☐ A specific/named scholarship, _____. If this scholarship and its criteria have not already been established, please complete an annual or endowed scholarship set up form and provide it with this document.

How would you like to be recognized? Check all that apply.

- ☐ Please include me/us, without disclosure of amount, in the Santa Monica College Foundation Legacy Society during my/our lifetime(s).
- ☐ Please include me/us in the Legacy Society listings at the corresponding giving level.
- ☐ After my/our lifetime(s), I/we wish to remain anonymous.
- ☐ After my/our lifetime(s), I/we would like to be included in publications with the aim of inspiring others to make similar gifts.

Name for Legacy Society listings (if not anonymous) _____

Thank you again for your continued support for Santa Monica College students' achievement of their dreams via your donations to Santa Monica College Foundation.

Santa Monica College Foundation and its employees do not provide tax or legal advice. You should consult with your chosen legal and financial advisors. It is helpful, but not mandatory, for Santa Monica College Foundation to receive a copy of the relevant section(s) of your will or other estate planning documents. Please attach these documents if possible.

I understand that by informing you of my intentions, my/our estate is not legally bound by this statement and that I/we may choose to change my estate plan and will at any time.

Printed Name _____

Signature _____

Date _____ Birthday (mo/year) _____

Printed Name (spouse) _____

Signature _____

Date _____ Birthday (mo/year) _____

Please return this form to: Santa Monica College Foundation, 1900 Pico Blvd, Santa Monica, CA 90405

If you have any questions, please feel free to call us at (310) 434-4215 or email foundation@smc.edu.

Please use this page to add any additional information.

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Santa Monica College Foundation		
2 Business name/disregarded entity name, if different from above		
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input checked="" type="checkbox"/> Other (see instructions) ► 501(c)(3) Charitable Organization	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>	
5 Address (number, street, and apt. or suite no.) See instructions. 1900 Pico Blvd	Requester's name and address (optional)	
6 City, state, and ZIP code Santa Monica, CA 90405		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
			-			-			
or									
Employer identification number									
9	5	-	6	0	4	7	7	7	9

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ► 	Date ► 7/5/23
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.